



Quality Assurance Rubric – Residential Analyst

Overview: Energy Smart Colorado’s mission is to make energy efficiency improvements simple and affordable for Colorado residents. Energy assessments performed by certified analysts are critical to this mission. ESC strongly encourages peer review of analysts to ensure that assessments are of high quality and follow Building Performance Institute (BPI) 1200-S-2017 and BPI-1100-T-2023 standards. Safety, clear recommendations, and professionalism are top priorities when building analysts are representing the Energy Smart Colorado brand and their local organizations. The following rubric may be used to help determine the quality of an analysts work and provide feedback to both the analyst and program partner. A QA assessment will take place during an actual energy audit at a customer home with the cooperation of the analyst and local program. The information contained in this report is confidential and is to be used internally by ESC, program partners, and the analyst only.

QA Date:

Analyst:

Program or Region:

QA Analyst:

Contact:

Contact

Contact:

Customer Name:

Customer Address:

Category (Expectations - not limited to)	Observations	Recommendations
Professionalism: Proper representation of ESC brand and local partner and/or utility. Conscientious of homeowner concerns, courteous demeanor, and professional appearance. <i>Refer to analyst agreement for full expectations.</i>		

Homeowner Interview: Determine homeowner concerns and goals, energy consumption and home maintenance habits, thermostat settings, bill history, and all relevant or known characteristics of the home <i>Refer to Annex F in BPI 1200 – S-2017 standards.</i>		
Building Enclosure Evaluation: Analyst must thoroughly inspect and note the building envelope for insulation characteristics and defects, including foundation, crawlspaces, attics, windows and doors, etc. Infrared Thermography should be used to evaluate deficiencies. The report should note any reasonable opportunity for upgrades of the building enclosure. <i>Refer to BPI-1200 standards Section 10.1</i>		
Air Leakage Evaluation: Analyst must accurately conduct the blower door test in accordance with industry standards, including proper house setup, baseline pressure measurement, and disable all combustion equipment. Home volume measurement is necessary to determining the NACH and should be accurately recorded in the report. A thorough (if not comprehensive) list of air sealing opportunities should be presented. The use of a pressure pan to evaluate leakage is highly encouraged. A		

discussion of ventilation standards should be included, especially in homes tighter than .35 NACH. <i>Refer to BPI 1200 section 10.2.2</i>		
Heating/Cooling and DHW Evaluation: Fuel type should be noted and heating/cooling systems evaluated for efficiency, maintenance, and safety. Distribution type must be noted and opportunities for improvements recorded. Special attention should be given to duct work and duct sealing. <i>Refer to BPI 1200 section 11.</i>		
Combustion Safety Testing: Ambient CO should be monitored from start to finish both in the main part of the home and the Combustion Appliance Zone. (CAZ) Sources of CO should be investigated and appropriate recommendations made according to BPI action levels. Analyst must check all accessible gas lines for leaks and conduct a Worst Case Scenario test of the CAZ appliances and gas ovens. Flue gases must be accurately measured and recorded. Unsafe conditions must be reported to the homeowner with appropriate action steps. <i>Refer to BPI 1200 section 7.</i>		
Baseload Energy Efficiency: The analyst must provide a description of the major appliances and plug loads and		

appropriate recommendations. <i>Refer to BPI 1200 Section 12.</i>		
Reporting: Use of ESC report, Snugg Pro, or similar report to convey detailed recommendations is required. Simple payback, SIR, or other payback is highly encouraged through energy modeling, hand calculations, etc. Report should be informative, accurate, easy to understand, and free of major grammatical errors. Recommendations should be standard to the industry, practical, and cost-effective. <i>Refer to ESC Formyula, Snugg Pro, or similar tool.</i>		
General Impression: The overall experience of analysts and their skill at home energy analysis should, at a minimum, reflect dedication to the profession and a commitment to learning and improving. QA is an opportunity for improvement through peer review and the analysts willingness to improve is evaluated here.		
Additional Notes:		